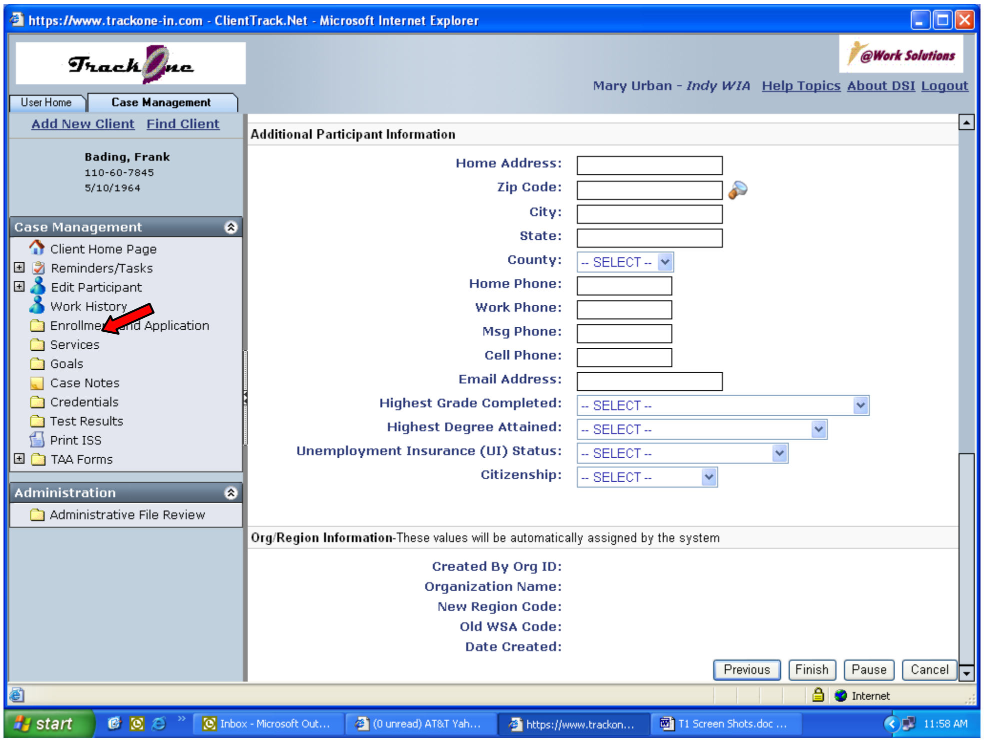
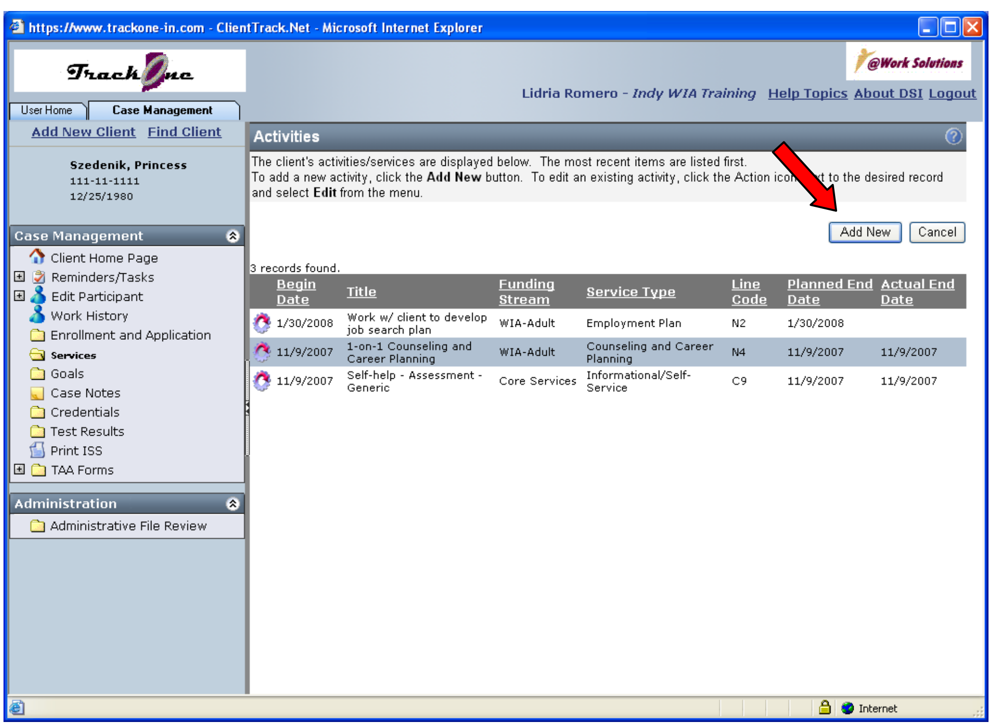
APPENDUM 2A

A. Required Veteran Services Entered in TrackOne

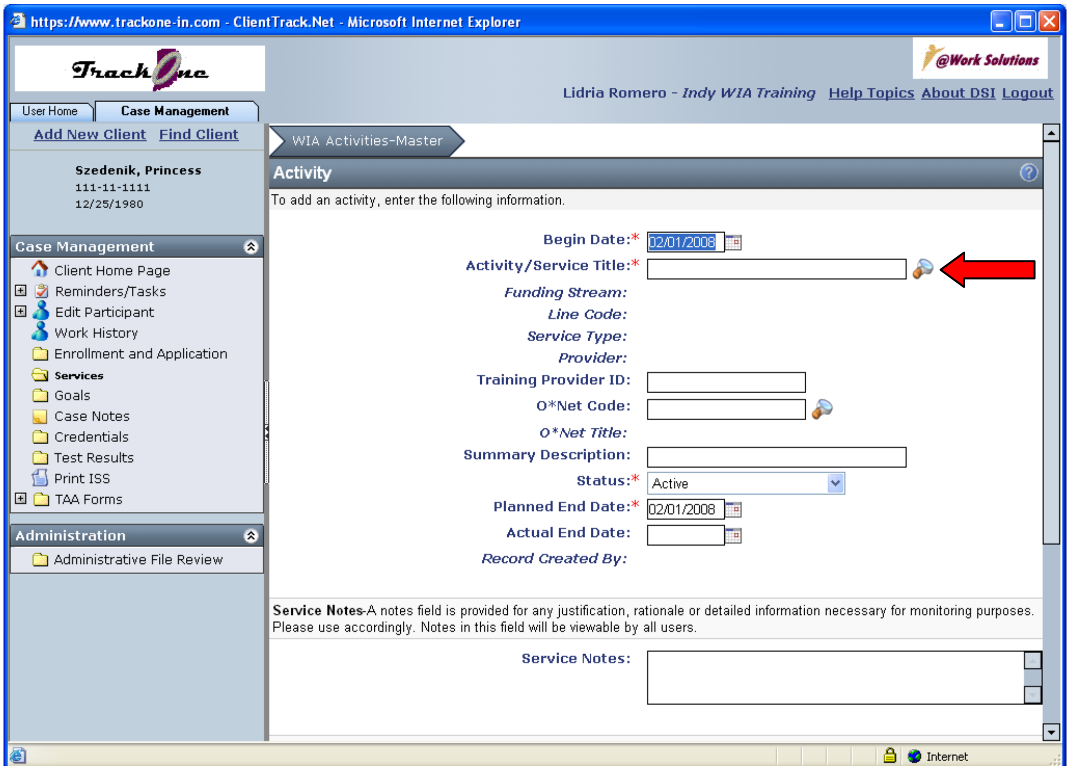
Step 1: Once logged in and customer is located, using the "Find Client" search, select the "Service" screen



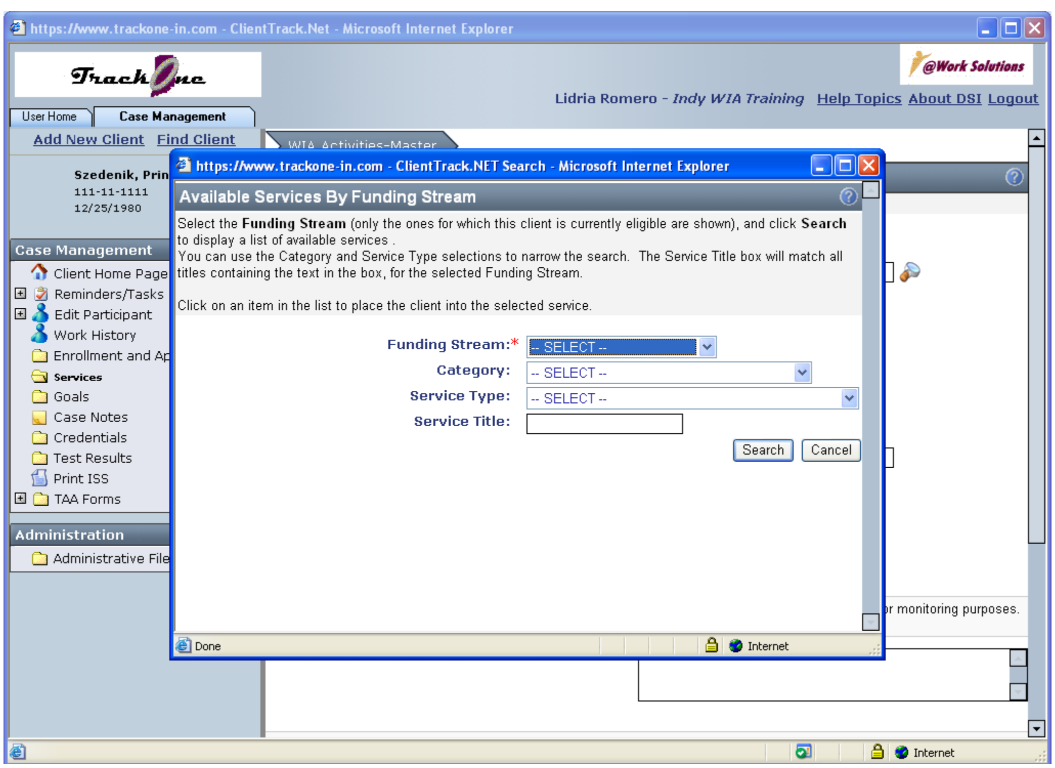
Step 2: To add a VET service, click the "Add New" button. This will take you to the activity screen



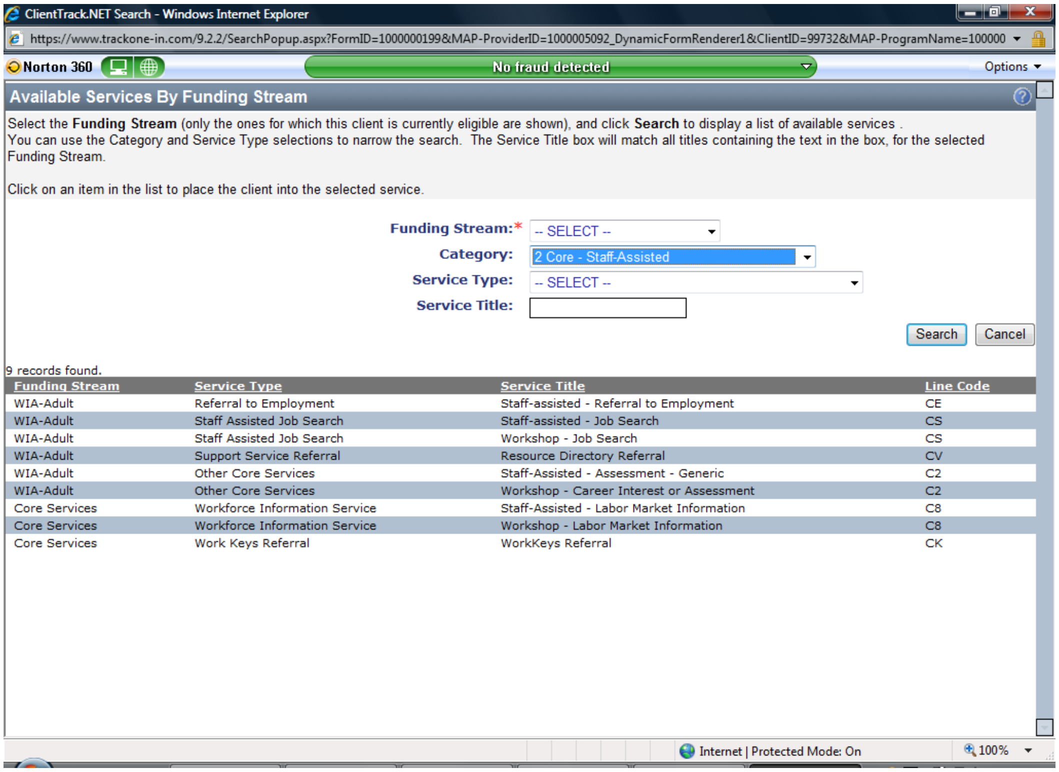
Step 3: At the “Add an Activity” page, click the magnifying glass next to Activity/Service Title, this will take you to available service by funding stream screen.



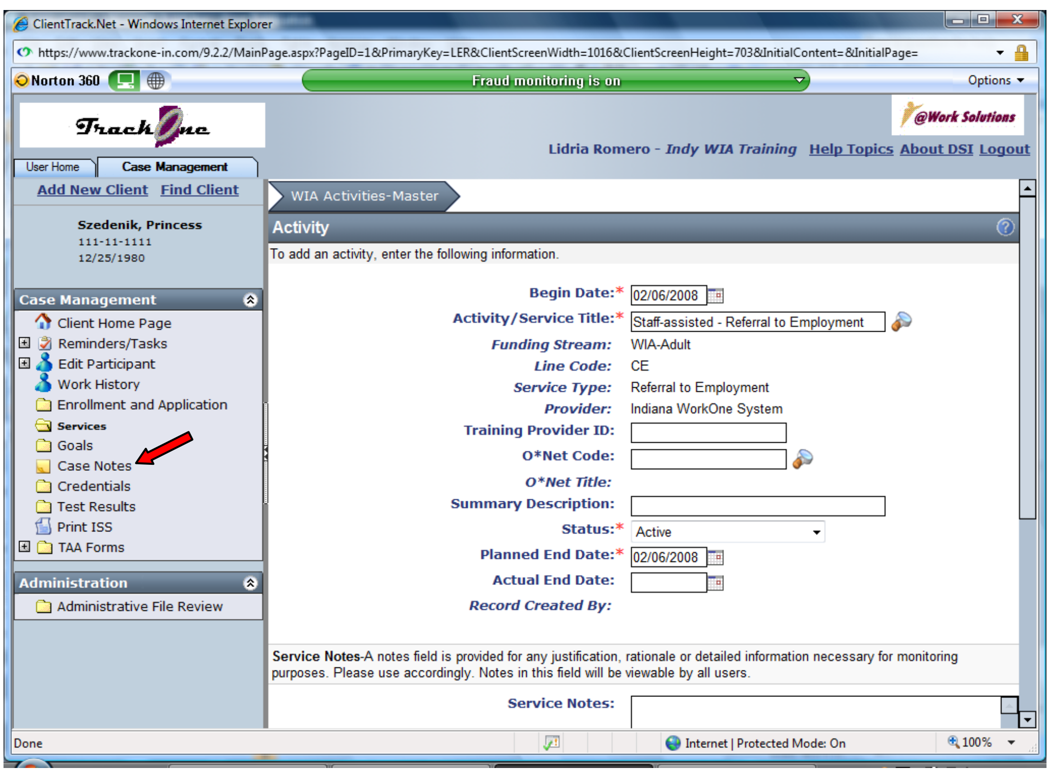
Step 4: In “Category” select the appropriate category according to what services you provided the VET customer (Most of the time, it’s either “Core Service” or “Staff Assisted”.



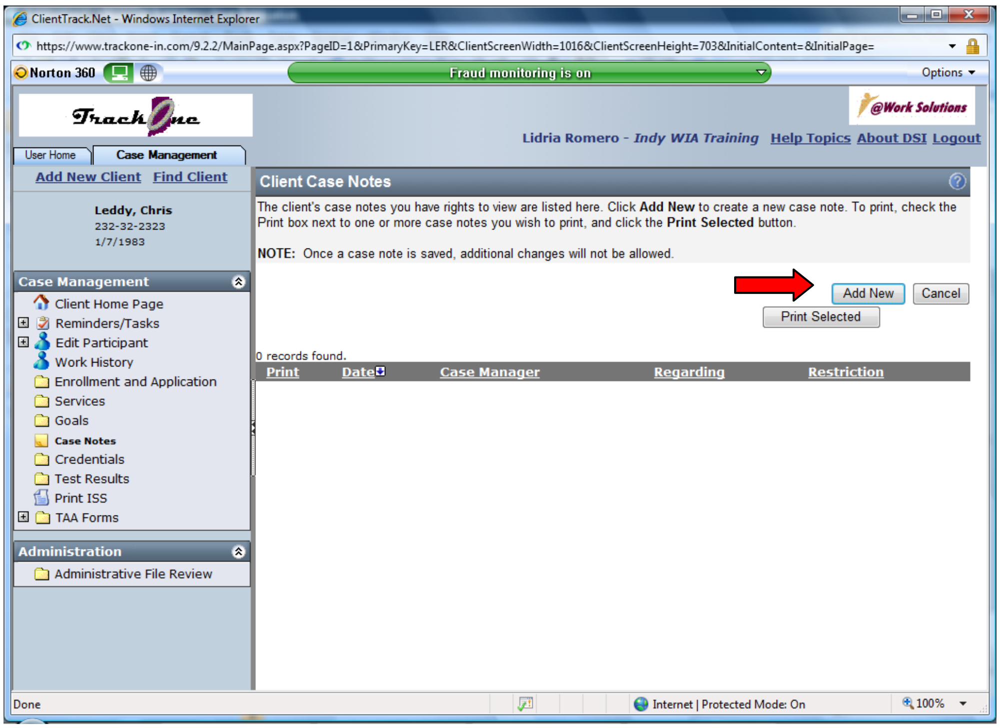
Step 5: Click "Search." A page displaying "Available services by funding stream" should show. Click on the appropriate Service Type. You will then be directed back to the "Activity" screen. **Note:** There are various services that may be selected for VET services (select most appropriate).



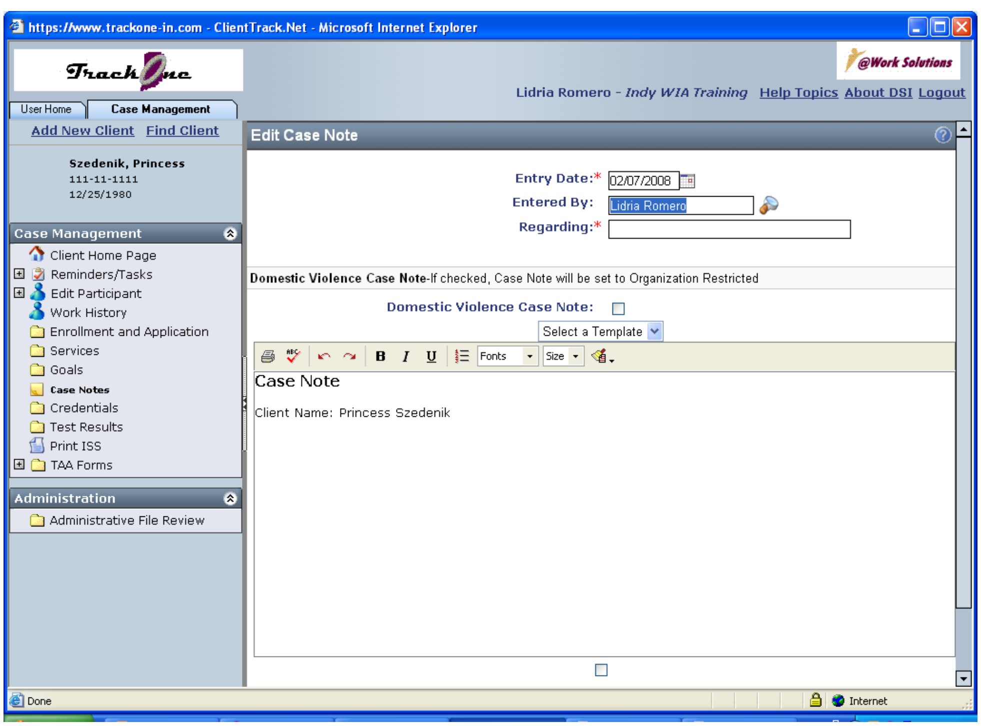
Step 6: Once back in "Activity" page, Select "Case Notes" to describe the service provided



Step 7: Enter in Case Note: Describe the service being provided to the veteran (for example, working on a resume, preparing for an interview, or dealing with a VA or GI Bill question); and, describe details that show the depth of service being provided to the veteran (for example, jobs/employers to which resumes were mailed, details about the interview preparation activity, or suggestions for addressing the VA or GI Bill questions that were raised).

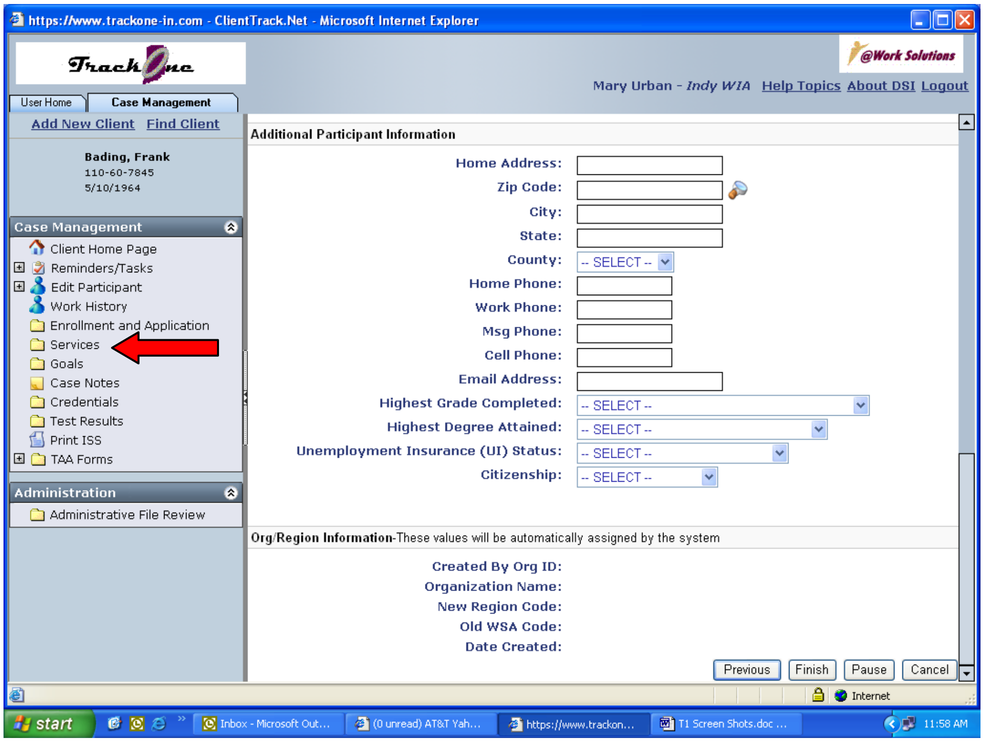


Step 8: After entering the case note, ensure the spelling and grammar are correct before selecting "Save". In "Case Note" page (seen below), select "Save" (may need to scroll down).



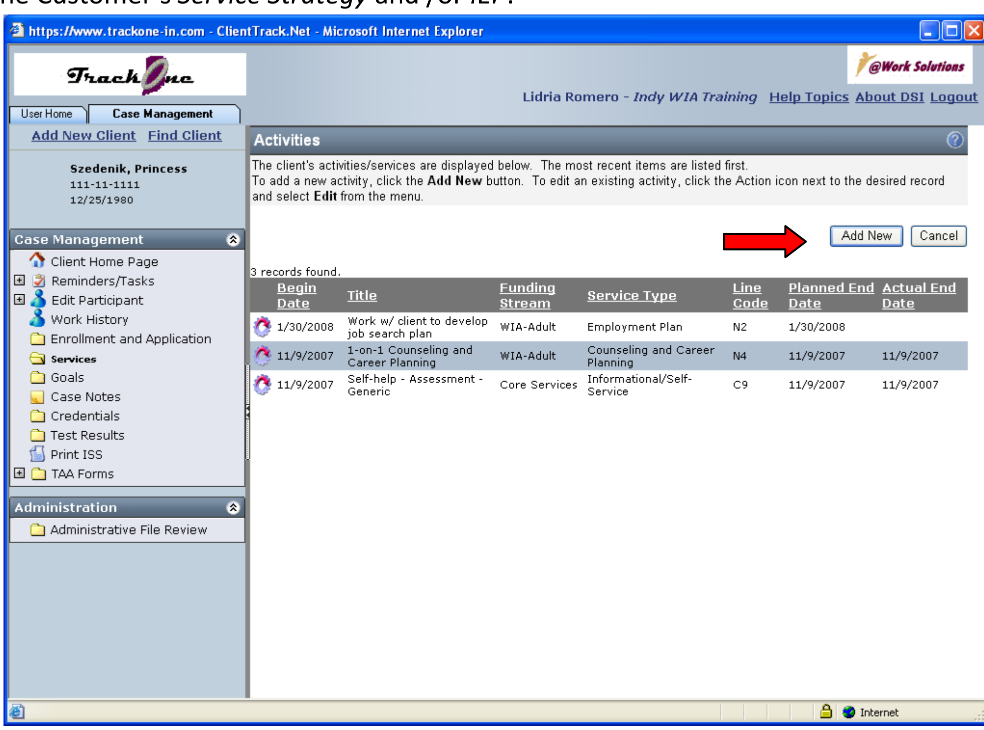
B. Service Strategy Development

Step 1: Enter a "Service"



Step 2:

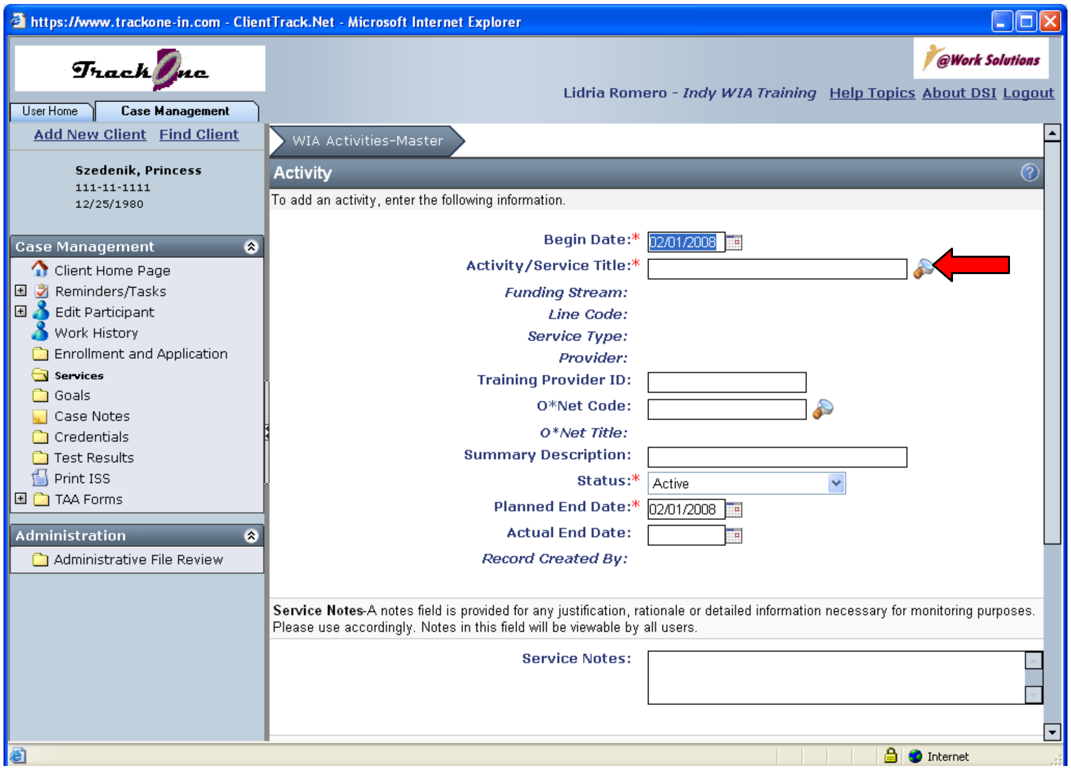
The "Activities" screen, displays the Customer's *Service Strategy* and/or *IEP*. All Services/Activities added should be displayed on this screen. In the "Activity" screen, click "Add New" to add an activity to the Customer's *Service Strategy* and /or *IEP*.



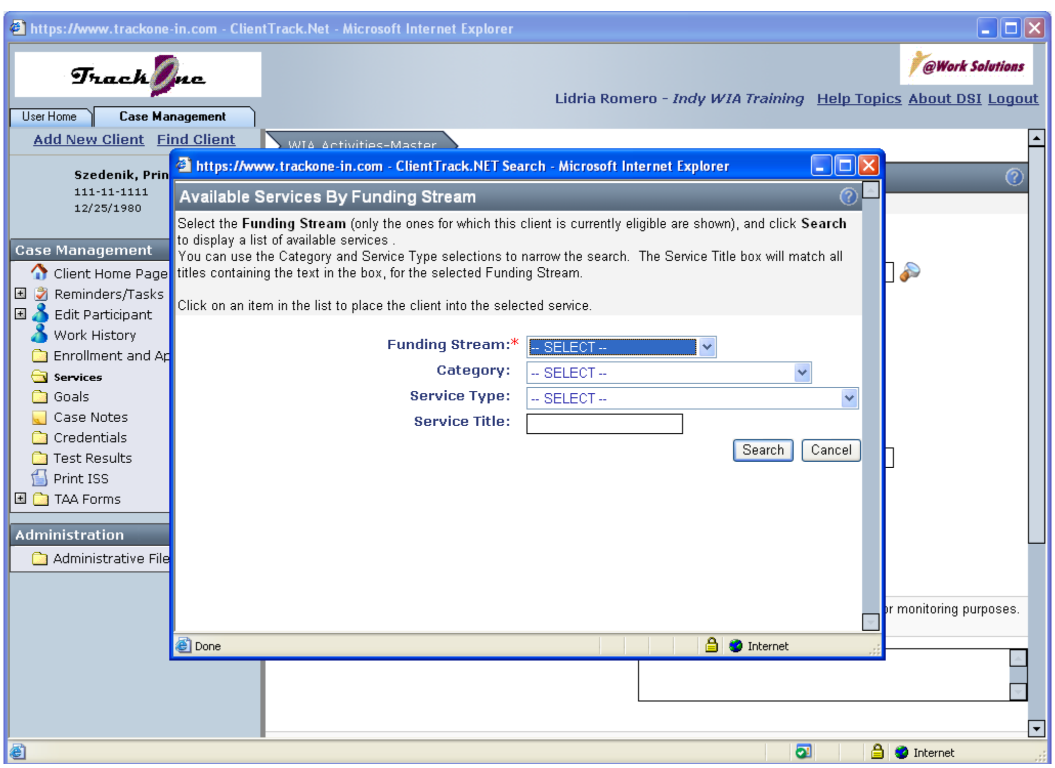
Customer's Service Strategy. "Service Type" category will either list Service "Strategy/Name of Activity" or "IEP/Name of Activity"

Step 3:

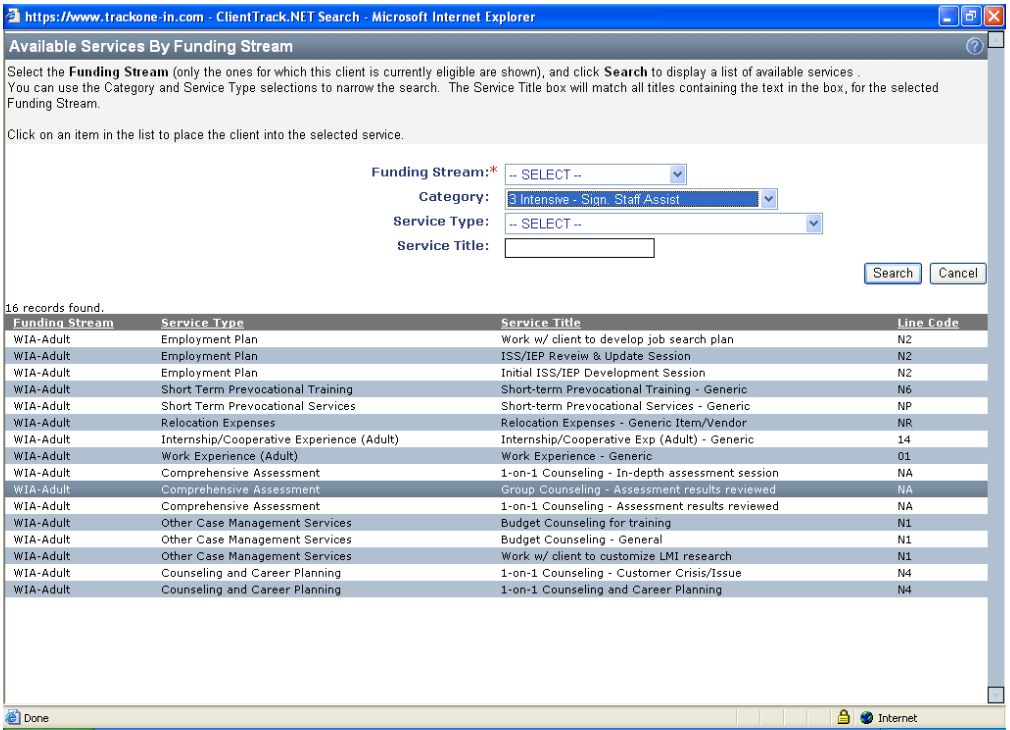
At the "Add an Activity" page, click the magnifying glass next to Activity/Service Title, this will take you to available service by funding stream screen.



Step 4: In "Category", select the appropriate "Category" and/or "service type" in the drop down menus.

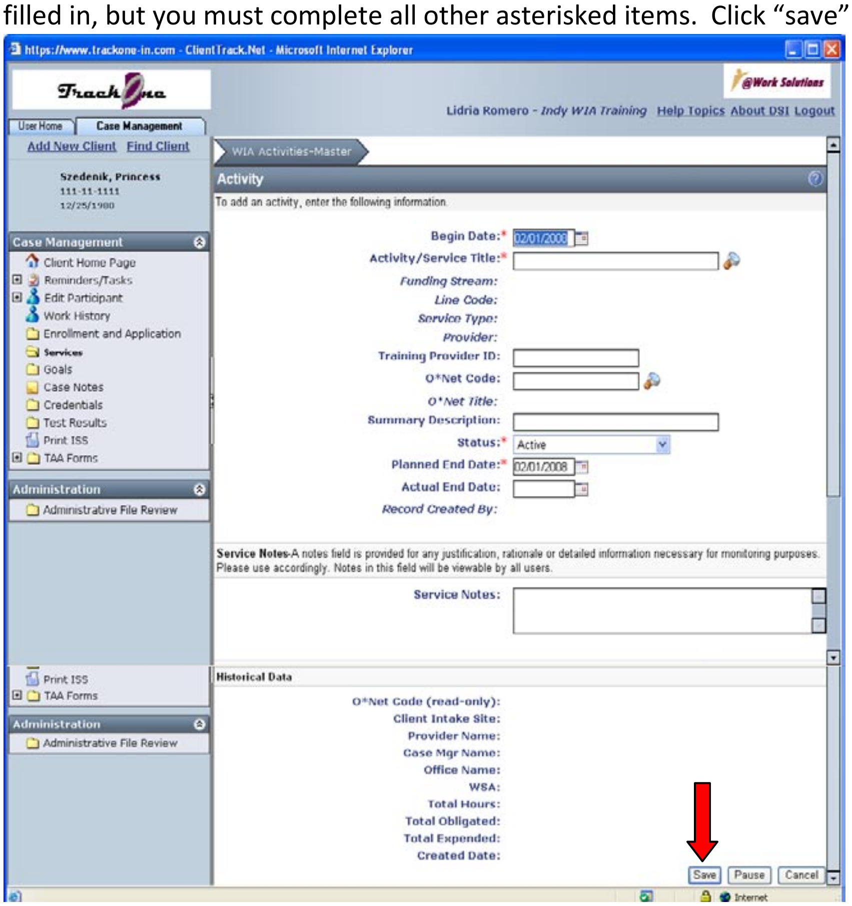


Step 5: Click "Search." A page displaying "Available services by funding stream" should show. Most times, either Category "3" or "6" is chosen. The page below displays the service types under "3 Intensive- Sign. Staff Assist." Choose the best that applies by clicking on the service type.



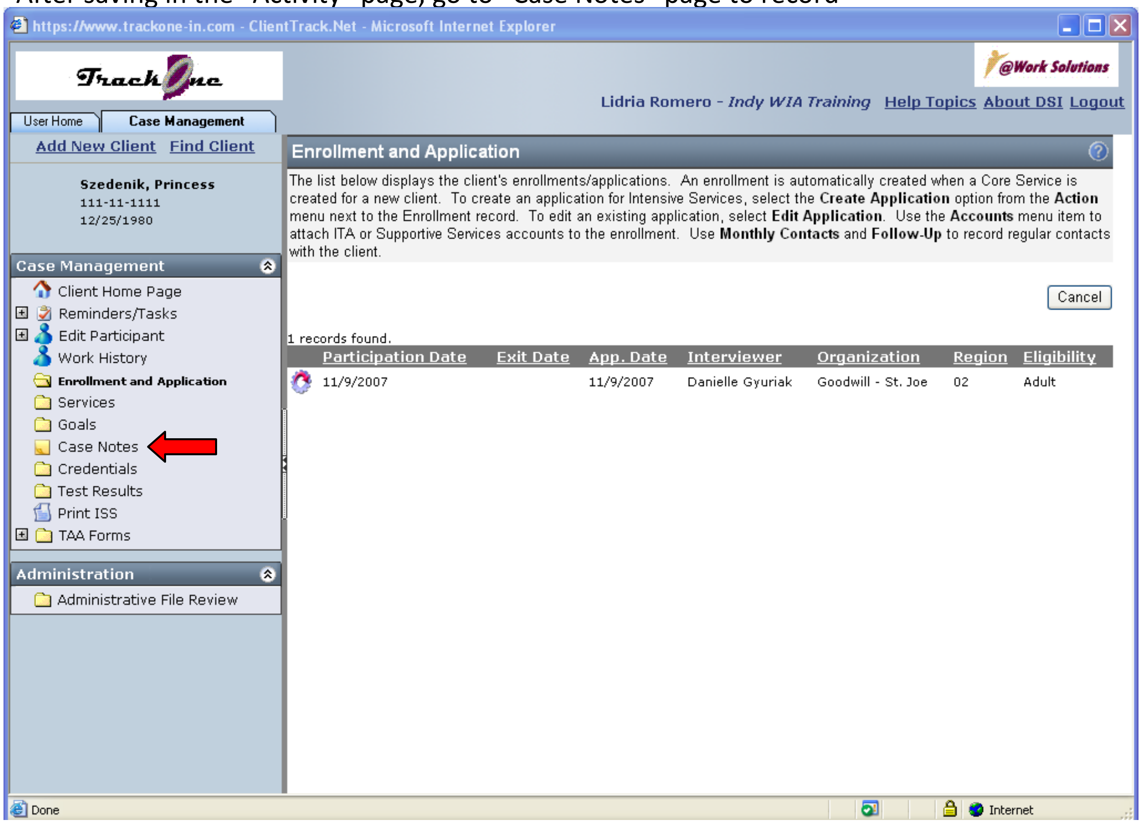
Funding Stream	Service Type	Service Title	Line Code
WIA-Adult	Employment Plan	Work w/ client to develop job search plan	N2
WIA-Adult	Employment Plan	ISS/IEP Reveiw & Update Session	N2
WIA-Adult	Employment Plan	Initial ISS/IEP Development Session	N2
WIA-Adult	Short Term Prevocational Training	Short-term Prevocational Training - Generic	N6
WIA-Adult	Short Term Prevocational Services	Short-term Prevocational Services - Generic	NP
WIA-Adult	Relocation Expenses	Relocation Expenses - Generic Item/Vendor	NR
WIA-Adult	Internship/Cooperative Experience (Adult)	Internship/Cooperative Exp (Adult) - Generic	14
WIA-Adult	Work Experience (Adult)	Work Experience - Generic	01
WIA-Adult	Comprehensive Assessment	1-on-1 Counseling - In-depth assessment session	NA
WIA-Adult	Comprehensive Assessment	Group Counseling - Assessment results reviewed	NA
WIA-Adult	Comprehensive Assessment	1-on-1 Counseling - Assessment results reviewed	NA
WIA-Adult	Other Case Management Services	Budget Counseling for training	N1
WIA-Adult	Other Case Management Services	Budget Counseling - General	N1
WIA-Adult	Other Case Management Services	Work w/ client to customize LMI research	N1
WIA-Adult	Counseling and Career Planning	1-on-1 Counseling - Customer Crisis/Issue	N4
WIA-Adult	Counseling and Career Planning	1-on-1 Counseling and Career Planning	N4

Step 6: After selecting, TrackOne will revert to the "Activity" page. Some entries may be automatically filled in, but you must complete all other asterisked items. Click "save"

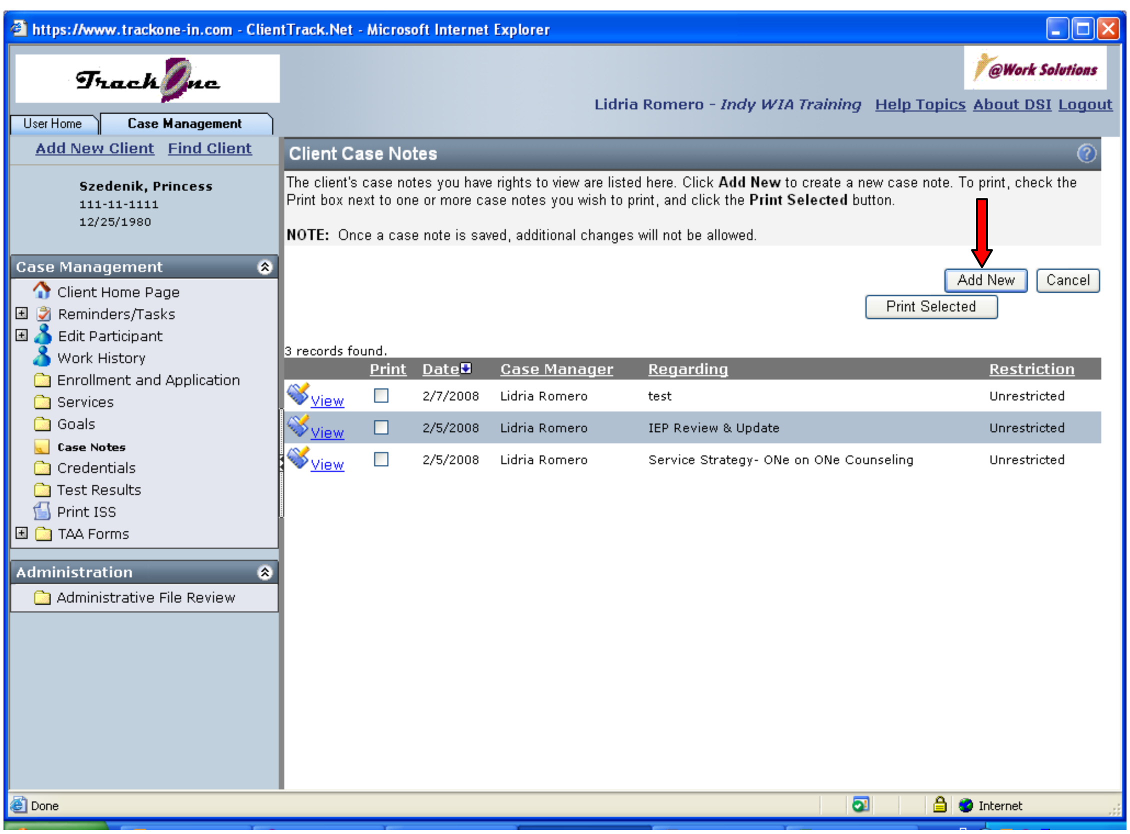


<u>Step 7:</u> Case Note

After saving in the "Activity" page, go to "Case Notes" page to record

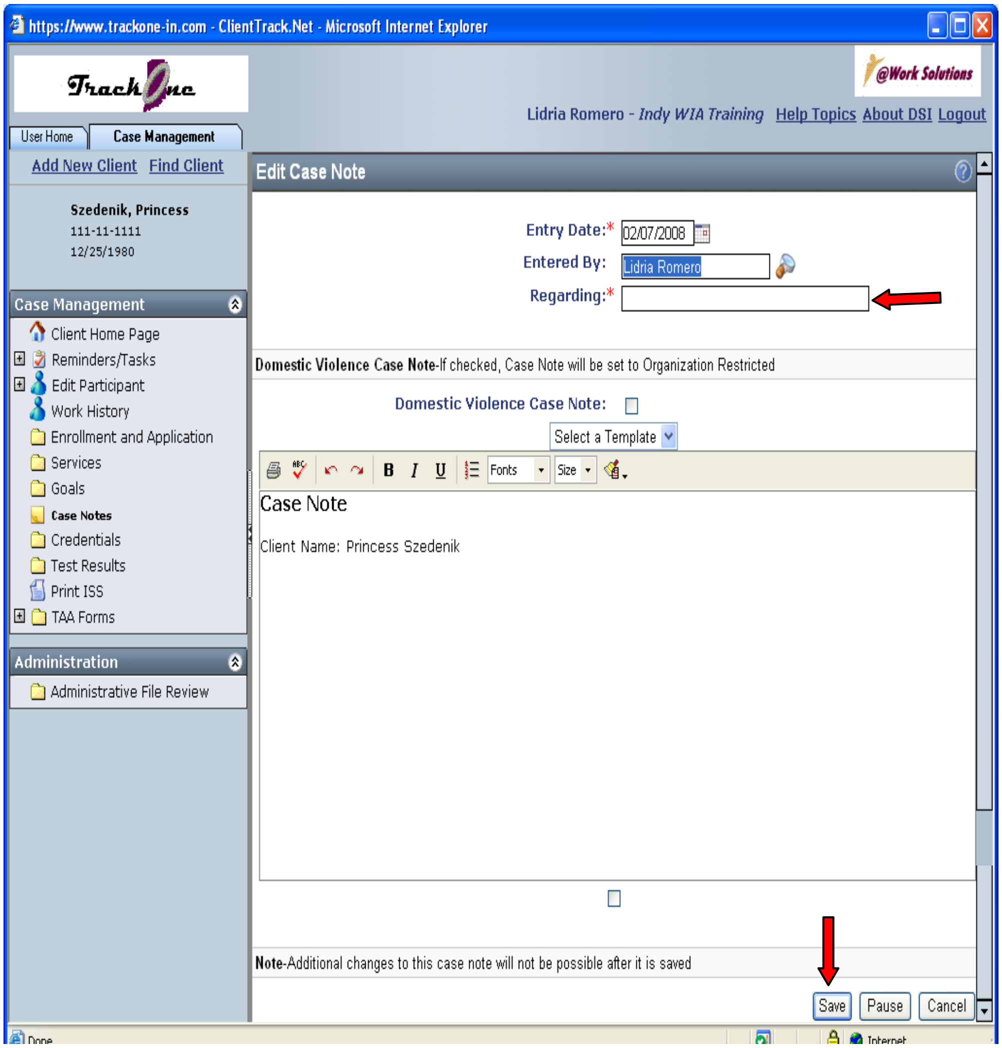


<u>Step 8:</u> Click "Add New" to add a new case note to the customer's *Service Strategy*



Step 9:

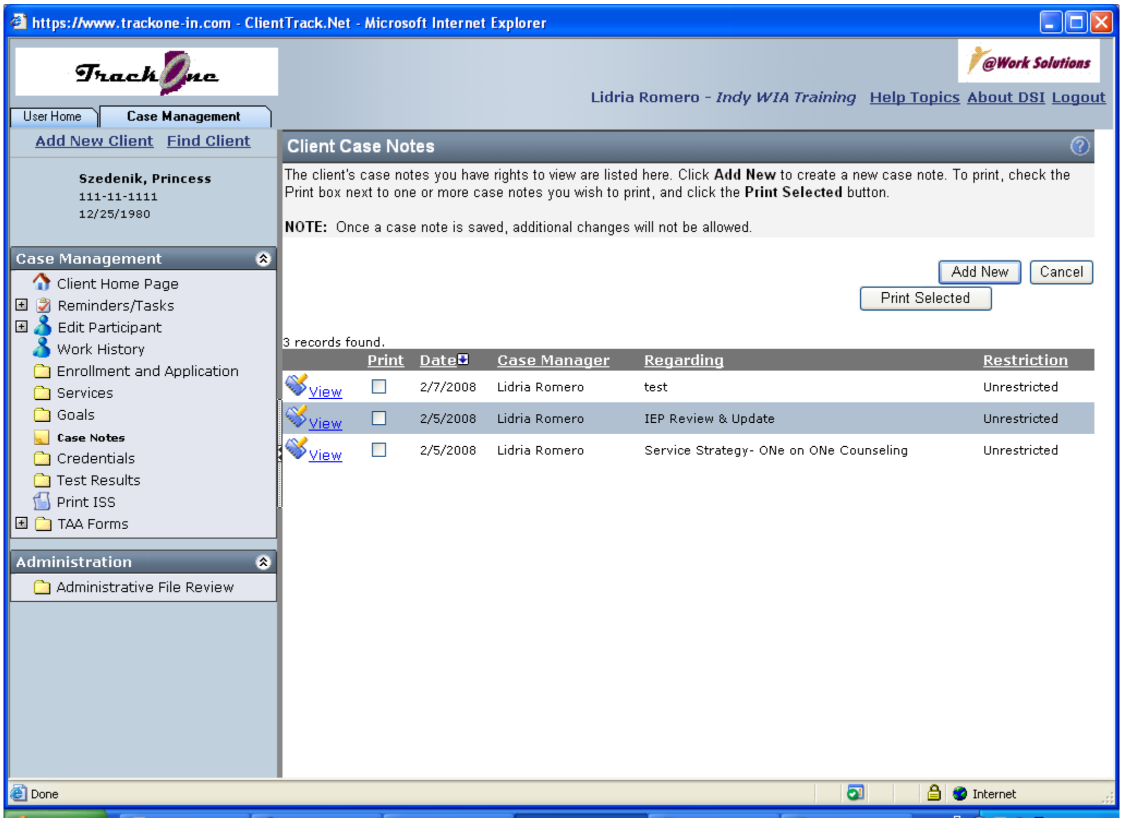
In the "Edit Case Note" screen, the "Entry Date" and "Entered by" will automatically be filled in by TrackOne. **In the "Regarding" box, the case note entered should be titled: "Service Strategy/Name of the Activity."** Example: "Service Strategy/Staff Assisted Job Search", "Service Strategy/TABE", or "Service Strategy/ Scheduled for Product Activity." Follow procedure manual for Case Note material. Click "Save" when done.



C. IEP

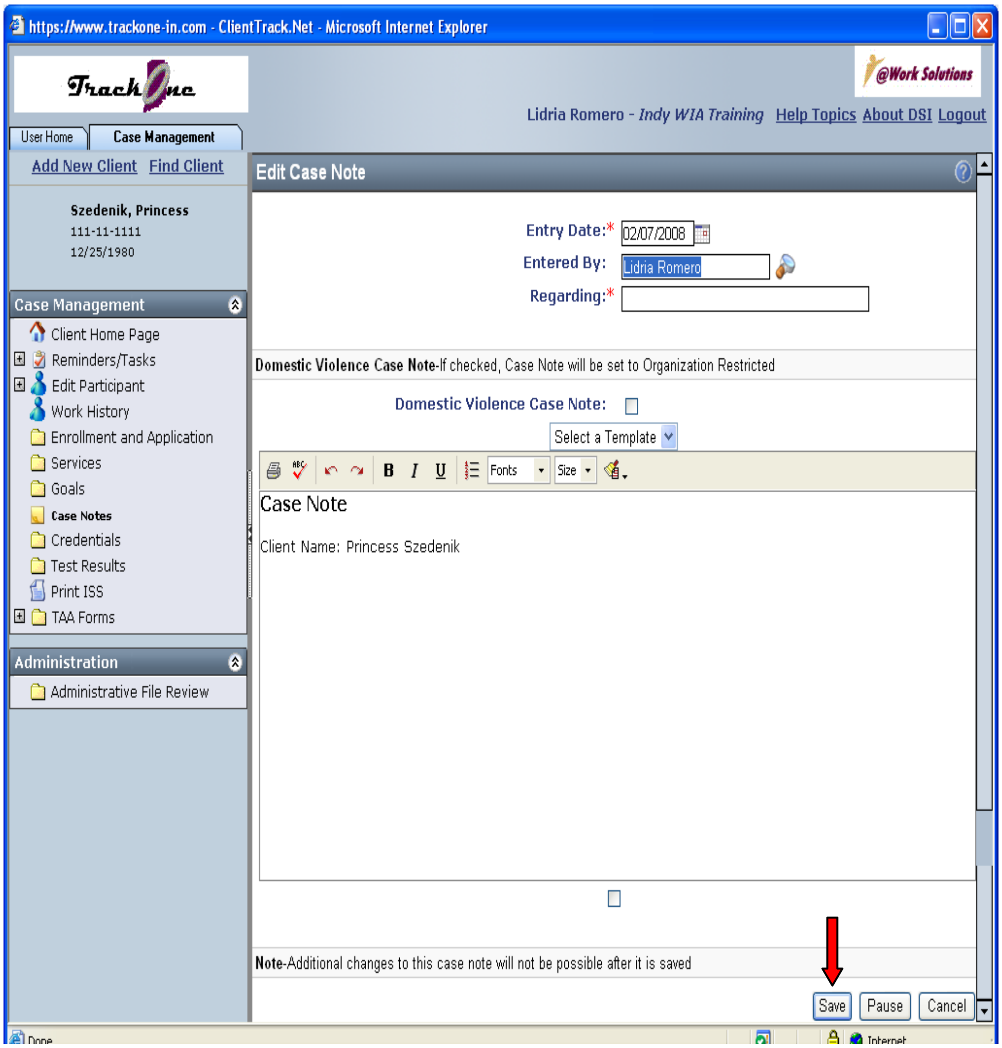
Follow Steps 1-7 in Section B. In Step 5, on the page displaying "Available services by funding stream" choose the correct "Service Type" and click "search." The page displaying the service types is displayed. Choose the best *Service Type* that applies.

Step 8: Click "Add New" to add a new case note to the customer's *IEP*



Step 9:

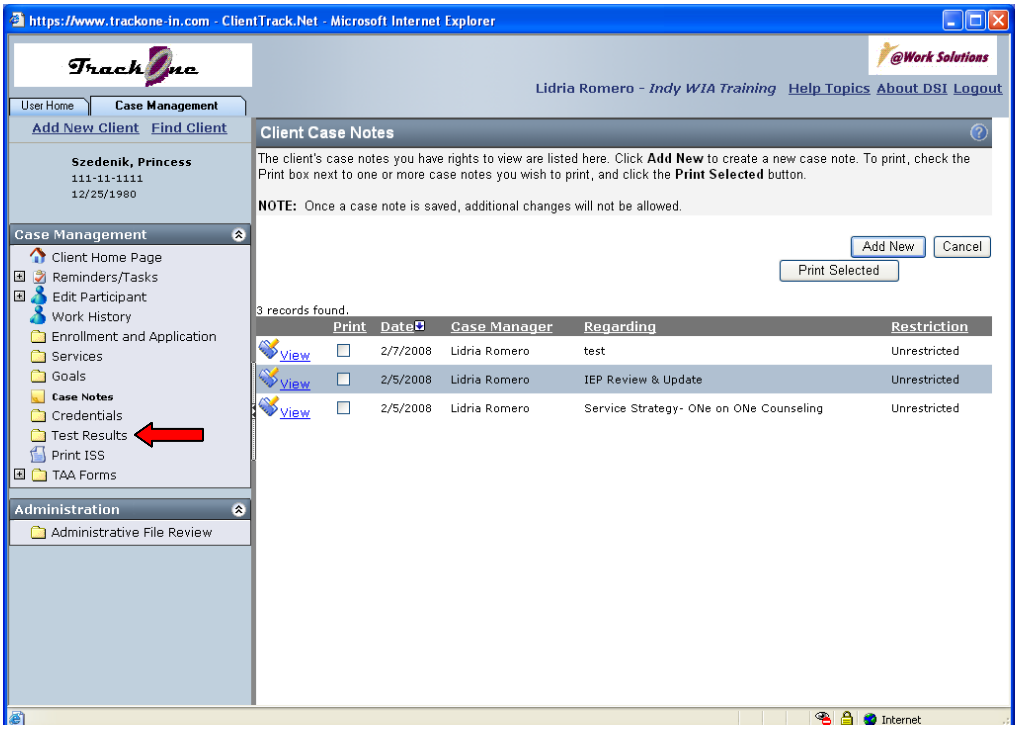
In the “Edit Case Note” screen, the “Entry Date” and “Entered by” will automatically be filled in by TrackOne. **In the “Regarding” box, the case note entered should be titled: “IEP/Name of the Activity.””** Example: “IEP/On-the-Job Training”, “IEP/Customized Training”, or “IEP/ Occupational Training.” Follow procedure manual for Case Note material. Click “Save” when done.



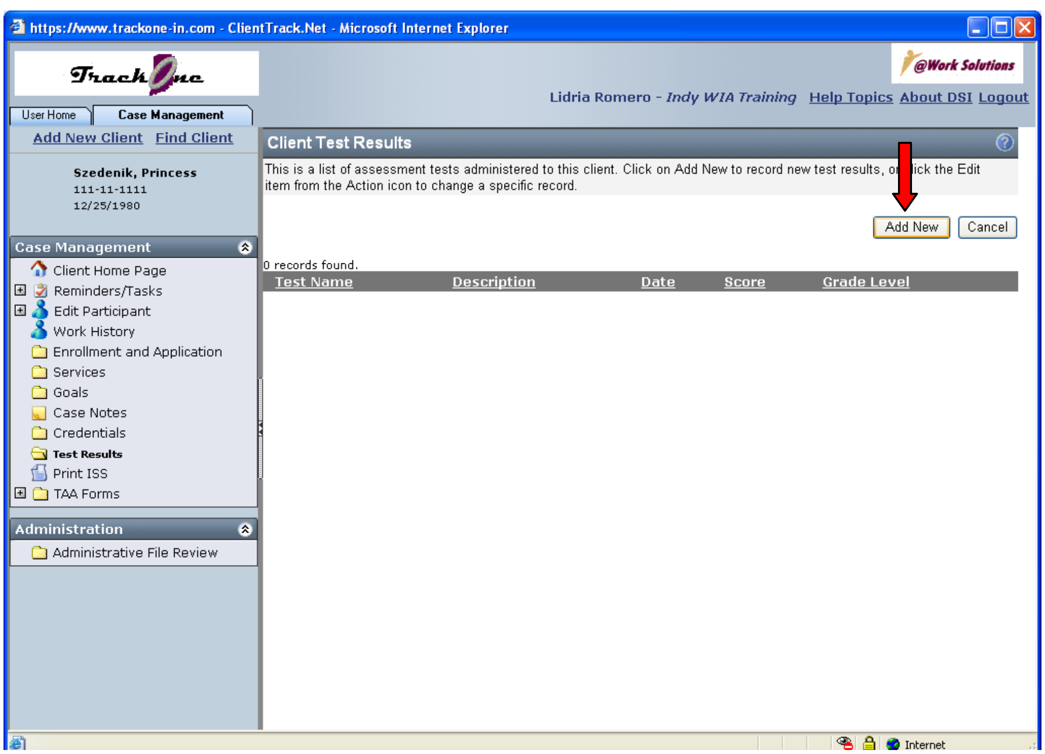
D. <u>Additional Assessment</u>

Follow Steps 1-9 in Section" B" to enter a "Service". In Step 5, on the page displaying "Available services by funding stream" choose the correct "Service Type" and click "search." The page displaying the service types displays. Choose the best *Service Type* that applies.

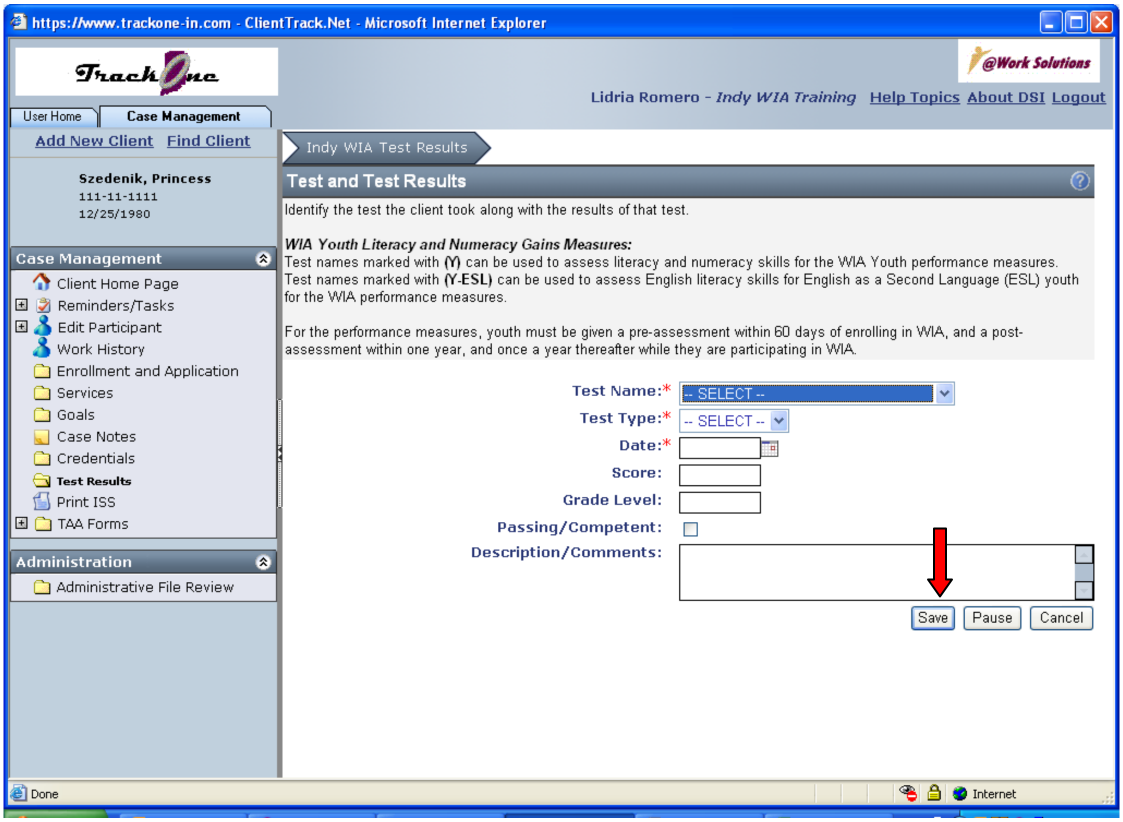
Step 10: After clicking "save" in the "case note" page, and to record a TABE, WorkKeys, or CASAS Test, click on "Test Results."



Step 11: Click on "Add New"



Step 12:
In the "Test and Test Result" page, fill in all appropriate fields. Click "Save."



E. Product Activities: Record in TrackOne

Follow Steps 1-9 in Section" B" to enter a "Service." In Step 5, on the page displaying "Available services by funding stream" choose the correct "Service Type" and click "search." The page displaying the service types displays. Choose the best *Service Type* that applies.